Editing Email Templates

Last Modified on 11/17/2026 5:20 pm EST

This guide explains the logic for email templates. It is intended for system administrators.

Email templates (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences) are standardized boilerplate text you configure for various emails sent from aACE. This saves users time composing emails and also ensures a common voice and style throughout the organization. You can access email templates by navigating from aACE Main Menu > System Admin > Email Integration > Email Templates.

When you email documents directly from an aACE module, the resulting email text is populated by the assigned email template. Different documents can be sent from aACE modules:

- Estimate or Quote
- Order
- Sales Order Invoice
- Invoice
- Customer Statement
- Receipt Notification
- Packing List
- Purchase Order
- Requests for Quotes (RFQs)
- Vendor Follow-Up
- Purchase Acknowledgment
- Remittance Advice
- Commission Statement

You are able to edit email templates for your aACE system, but the process can be difficult for users. To create new email templates, contact your aACE Support Representative.

Note that images are not supported in email templates.

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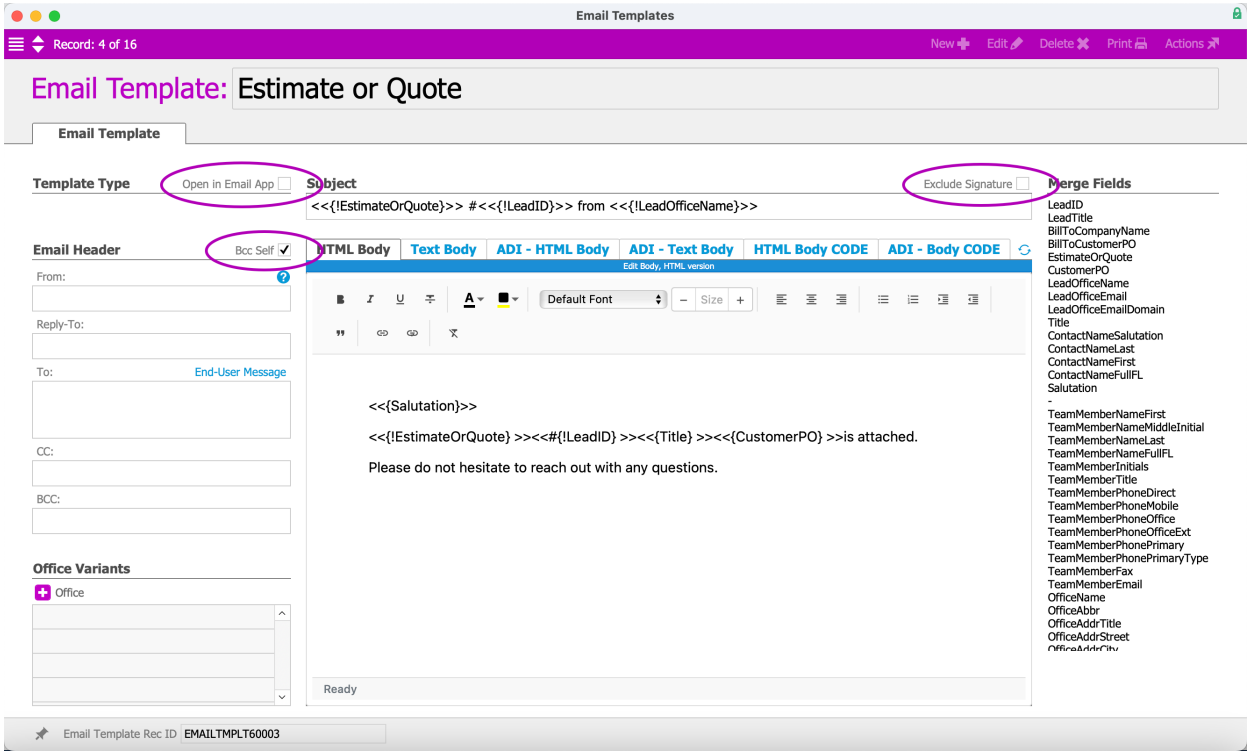
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Understanding Preferences for Email Templates

Each email template has a few preferences you can enable depending on your business workflows:

- **Open in Email App** — When a user selects an email action that would usually open the aACE Email Composer, aACE will open the default email app on the user workstation instead.
- **Bcc Self** — The user will receive a copy of the email they send in aACE for their own records.
  aACE does not automatically copy the user when they send an email. The Bcc Self preference is beneficial for testing the email template initially but can also be used in other situations.
- **Exclude Signature** — The email body does not include a signature.



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Understanding the Email Header Logic

The Email Header section is used to enter details relating to the email delivery.

Populating the From and Reply-To Fields

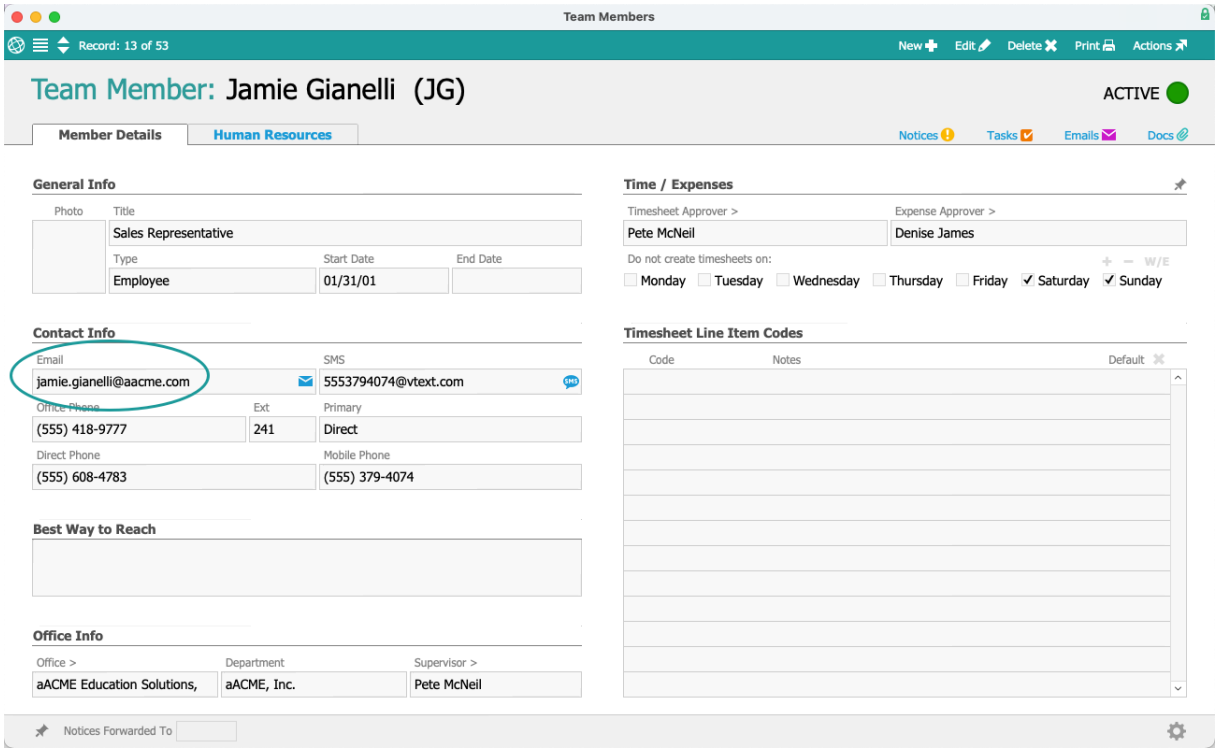
When entering a From email address, the most important part of the email address is the domain, which is information after the at sign (@). The email address you enter does not need to be an existing email address. For example, you can enter AP@customer.aACEsoft.email for your remittance advice template without creating a new email address. If you populate the From field with a custom email without populating the Reply-To field, aACE uses the From email address as the Reply-To email address.

The From and Reply-To fields only allow a single value for each field. Values entered at the email template are prioritized over default values. If a change to a email template's default logic is required for these settings, contact your aACE Support Representative.

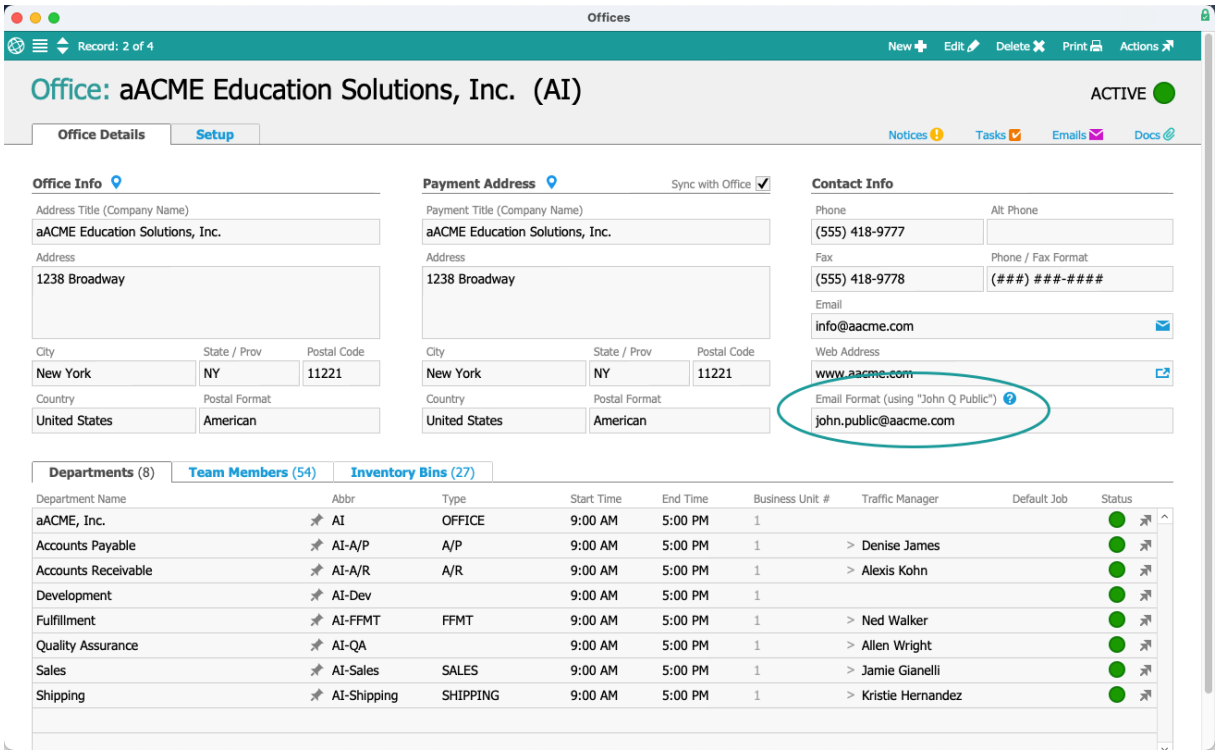
Empty From and Reply-To Fields

If the From and Reply-To fields are empty within the email template, aACE looks to the following places in order and uses the first usable value:

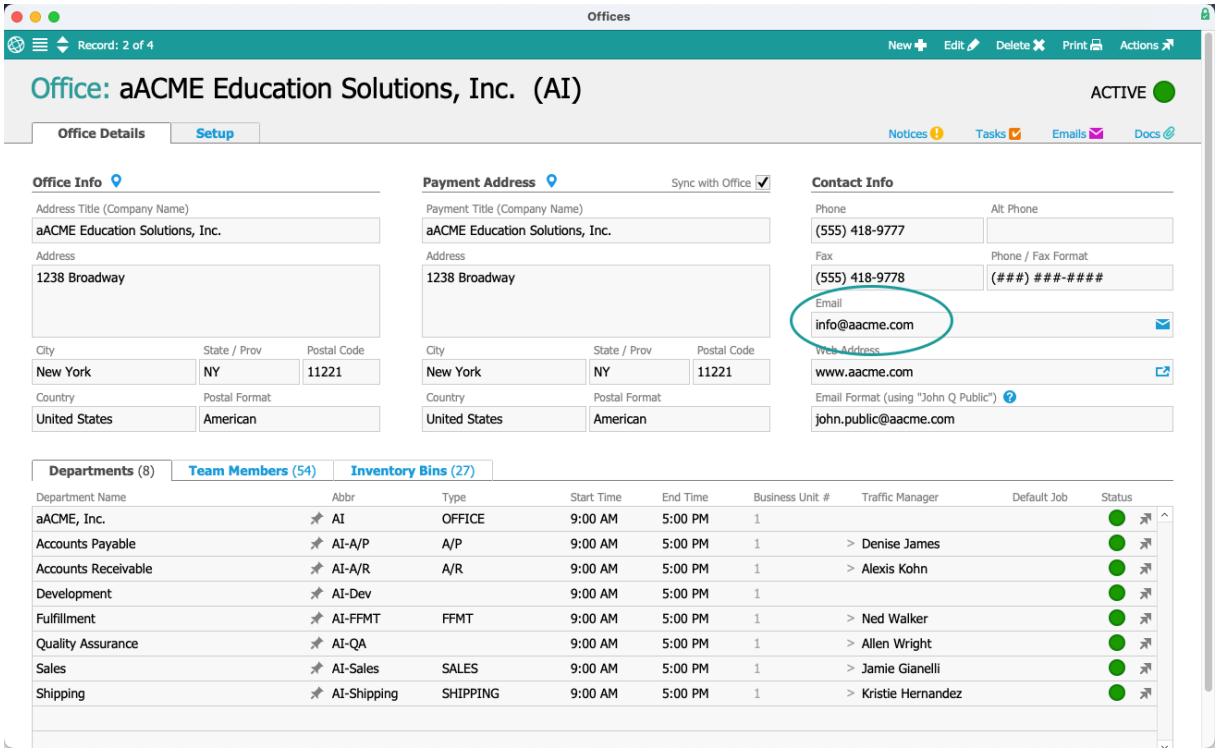
1. Team member Email field — Uses the current user's team member email address as-is. From the Main Menu, go to Internal> Team Members, then locate the team member record.



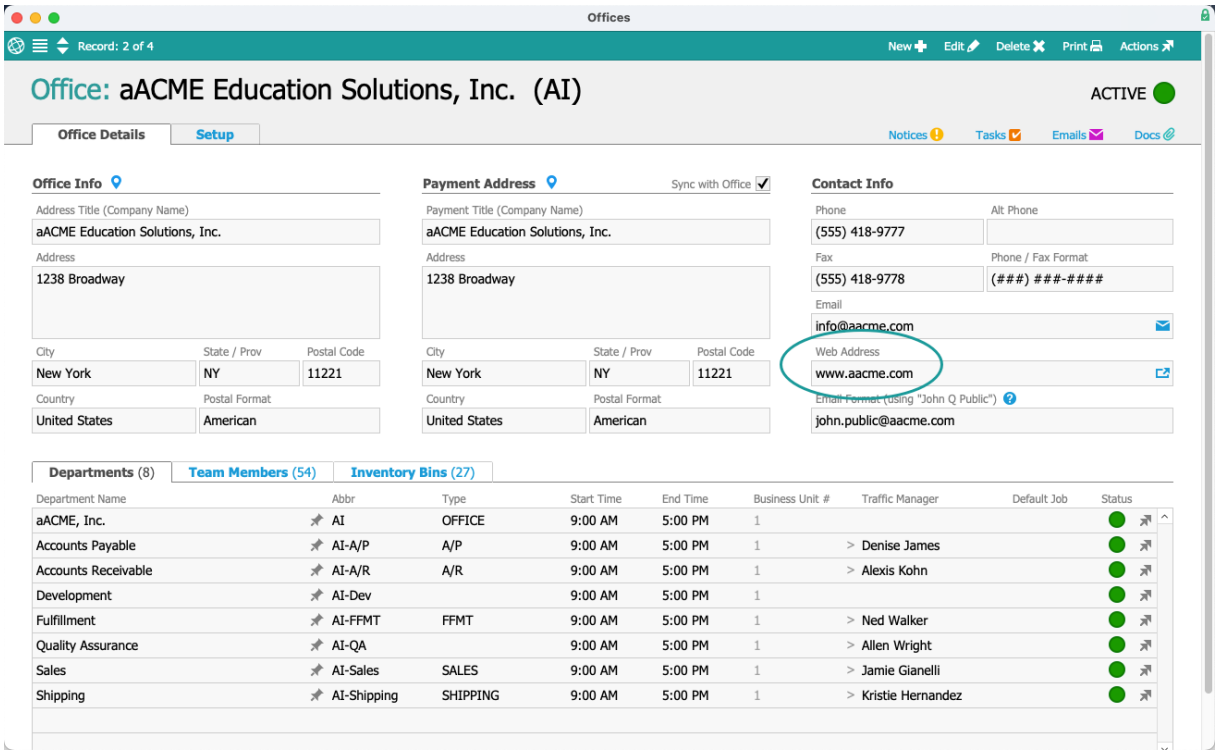
2. Office Email Format field domain — Uses the domain of the email format specified at the office record, then adds aACE as the sub-domain. For example, the format is aACE@<domain>. From the Main Menu, go to Internal > Offices, then locate the office record.



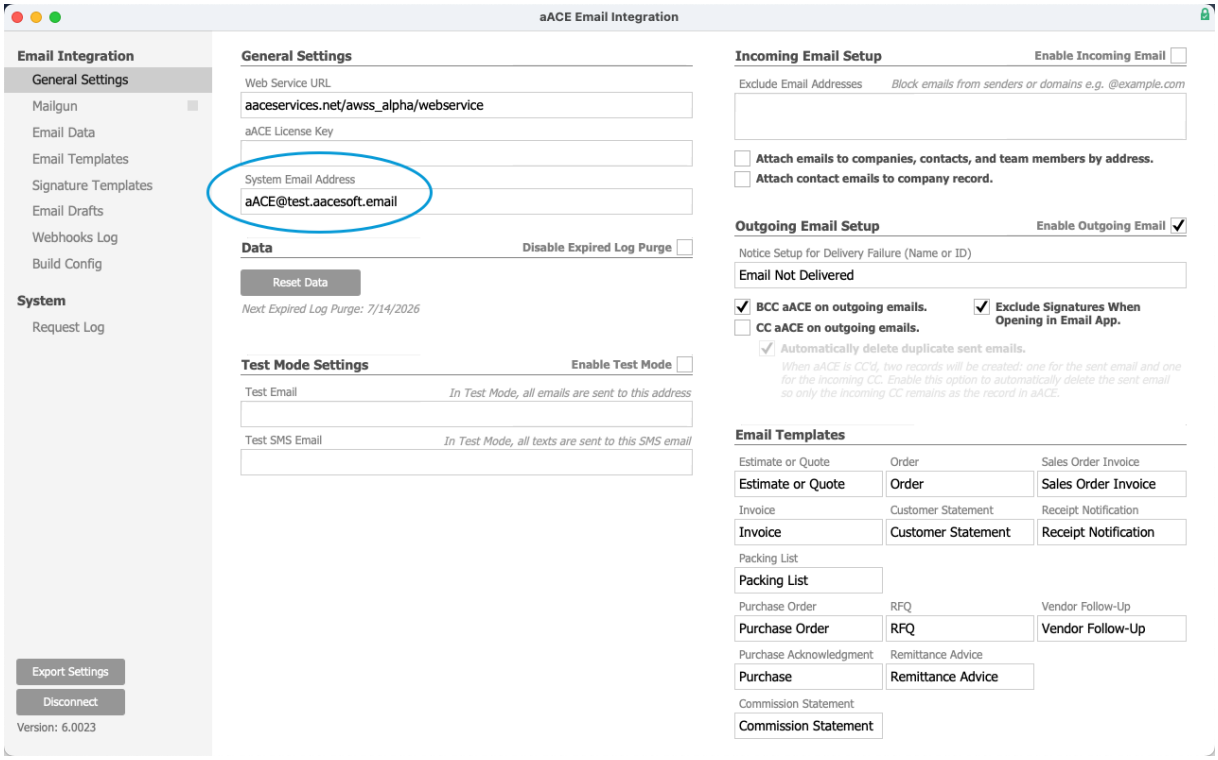
3. Office Email field — Uses the email listed in the office record. From the Main Menu, go to Internal > Offices, then locate the office record.



4. Office website domain — Uses the bare, validated host of the office website address. aACE strips the protocol and "www.", then takes the website domain up until the first of the following symbols: / ? # :. If validated, aACE builds an email domain similarly to the office email format process. From the Main Menu, go to Internal > Offices, then locate the office record.



5. aACE system email address — Uses the email address listed in the Email Integration module. From the Main Menu, go to System Admin > Email Integration.



Similarly, automated emails sent by the server will use the system email address (https://aace6.knowledgeowl.com/help/setting-up-the-aace-email-integration) if these fields are empty within the email template. When email automation is enabled, we recommend populating the From and Reply-To fields with the appropriate email addresses to prevent the system email address from being used.

Populating the To, CC, and BCC Fields

The To, CC, and BCC fields are active values and have underlying default logic (https://aace6.knowledgeowl.com/help/understanding-data-sources-for-email-templates#aace-data-sources-for-to-and-cc-fields). If these values are populated through merge fields or manually entered values, the changes are treated as additions to the default logic. For example, if a user adds an email address to the CC field while drafting an email, this email address will be added to the email alongside the email template's defined CC email addresses if applicable.

Additionally, the To, CC, and BCC fields allow many values. The aACE system adds both email template and default values to the email.

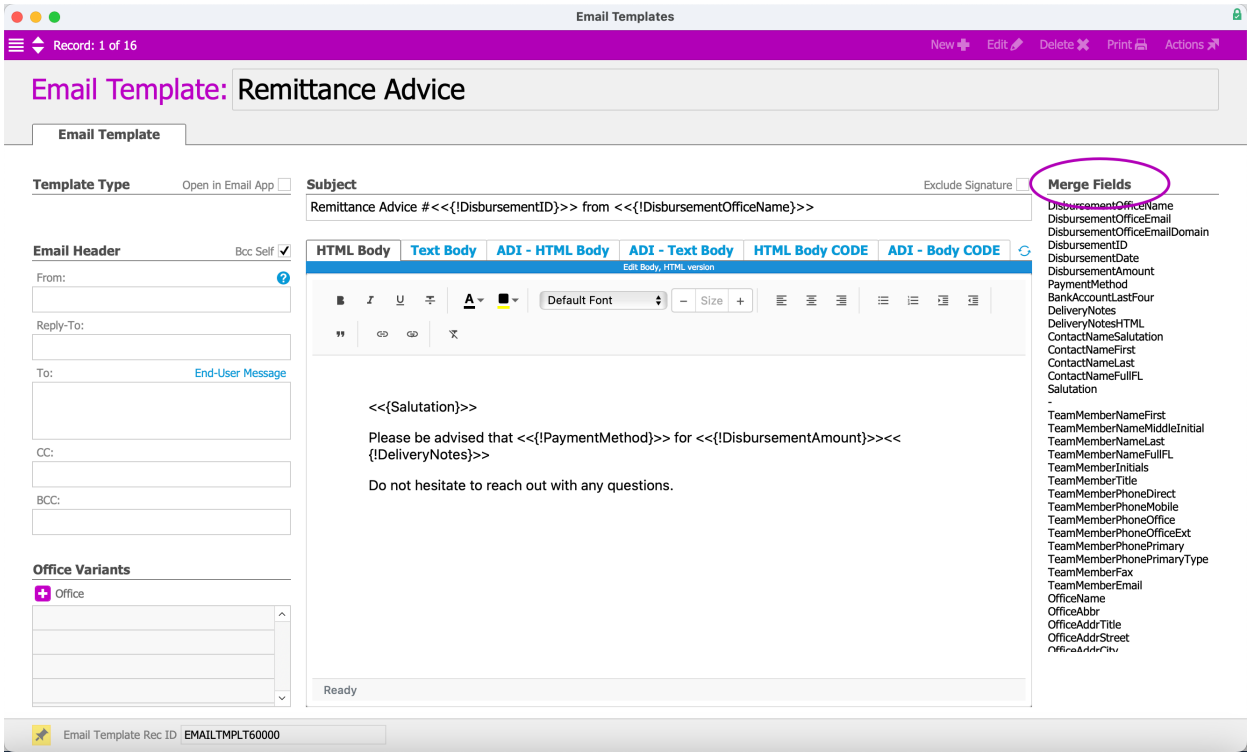
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Understanding Merge Tags for the Email Upgrade

By using merge tags, you can edit your email templates to use information provided on other

aACE records. Merge tags can be used in any part of your email template. For example, to automatically provide your team member name in the email, you can use the TeamMemberNameFirst merge tag in the email body. aACE populates the user's first name based on their team member record.

aACE provides a list of available merge fields for each email template. If you need a merge tag that is unavailable, contact your aACE Support Representative.



Merge tag conventions for the body and the header are the same. However, merge tags vary depending on the version of the aACE Email Integration your system has. When updating your merge tags, you must add the merge tag content to both the Text Body and HTML Body.

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Using Merge Tags for the Email Upgrade

Body merge fields have two types of tag formatting: <<{MergeTag}>> and <<{!RequiredMergeTag}>>. There is also one type of header merge tag.

Subject and Body Merge Tags

General Merge Tag Formatting

Using the general <<{MergeTag}>> formatting indicates to aACE the value is not required. If the value is not found when aACE populates the email, the system will create the email draft with no value for the tag. The email will be sent normally. The email can also be sent automatically without the value being populated.

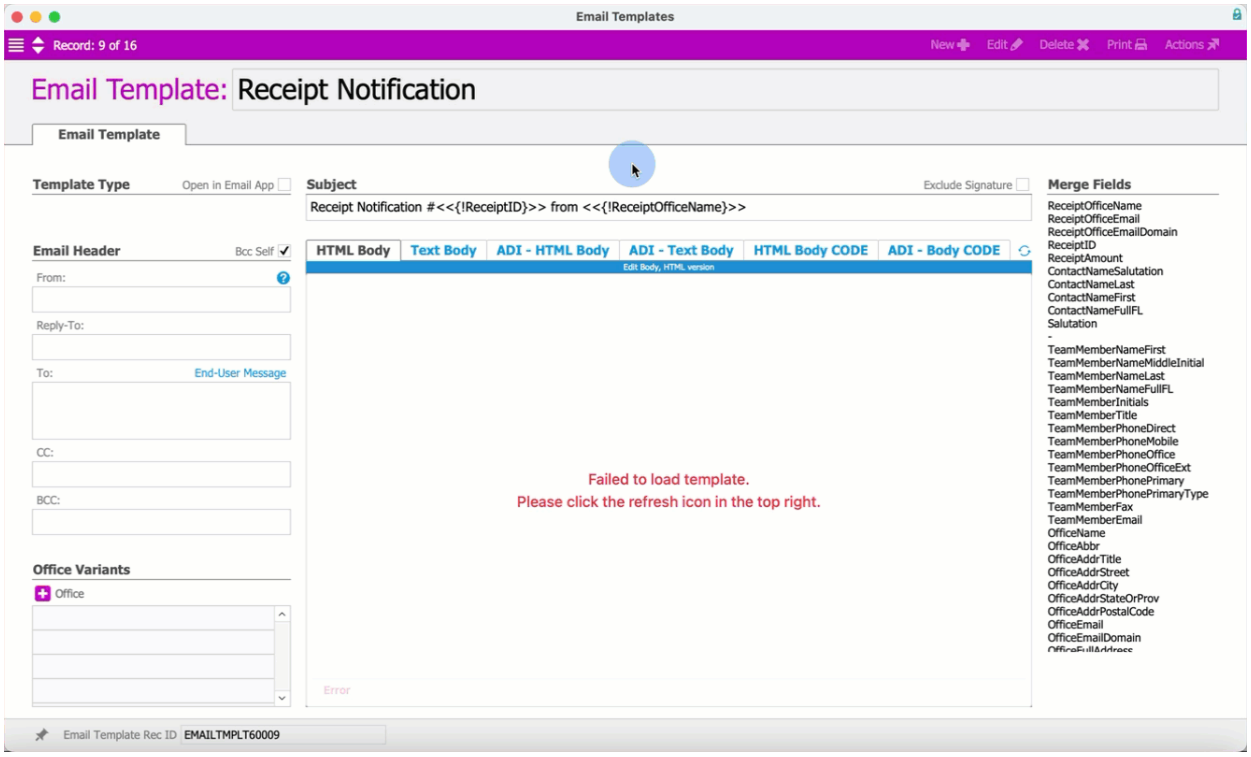
Required Merge Tag Formatting

Using the <<{!RequiredMergeTag}>> formatting indicates to aACE the value is required. If the value is not found when aACE populates the email, the system will display an error. The email will not be sent, and the user must make edits before sending the email. The email also cannot be sent automatically without the value being populated.

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Refreshing HTML

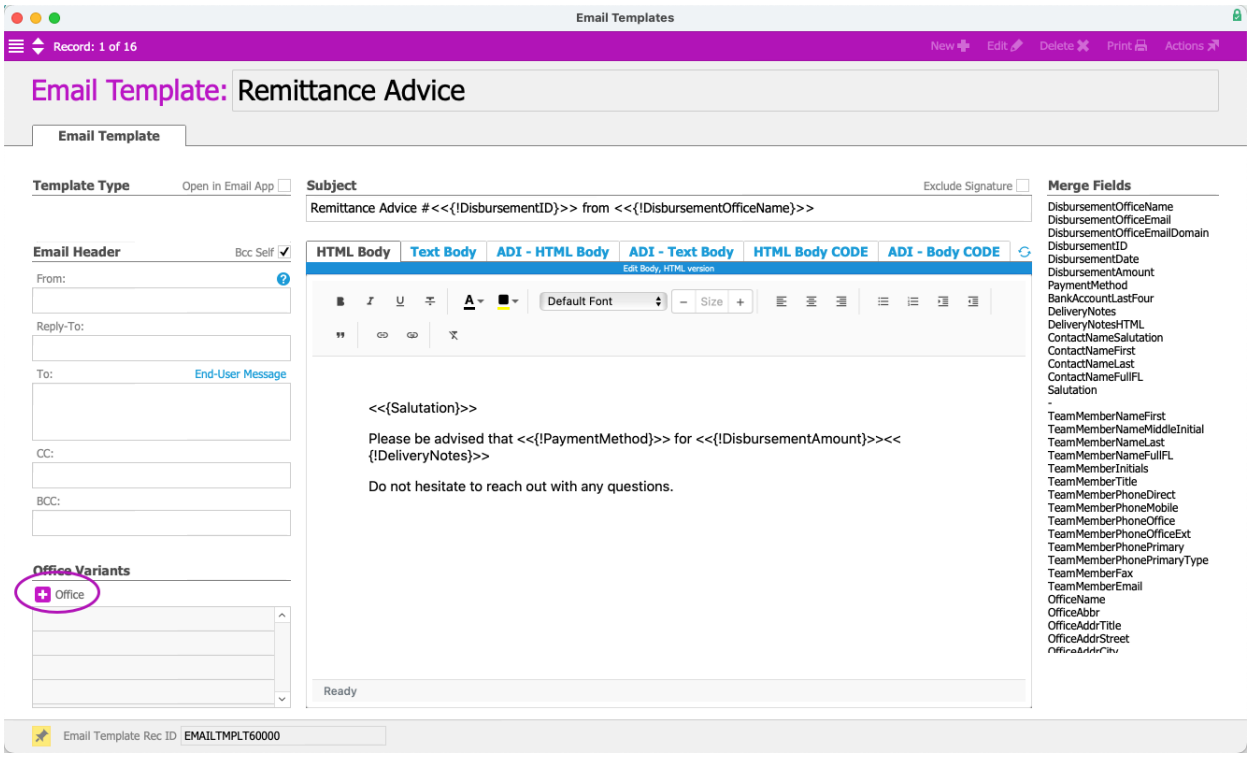
Occasionally, the email template HTML does not load properly. You can select the Refresh icon ( ) to reload the HTML.



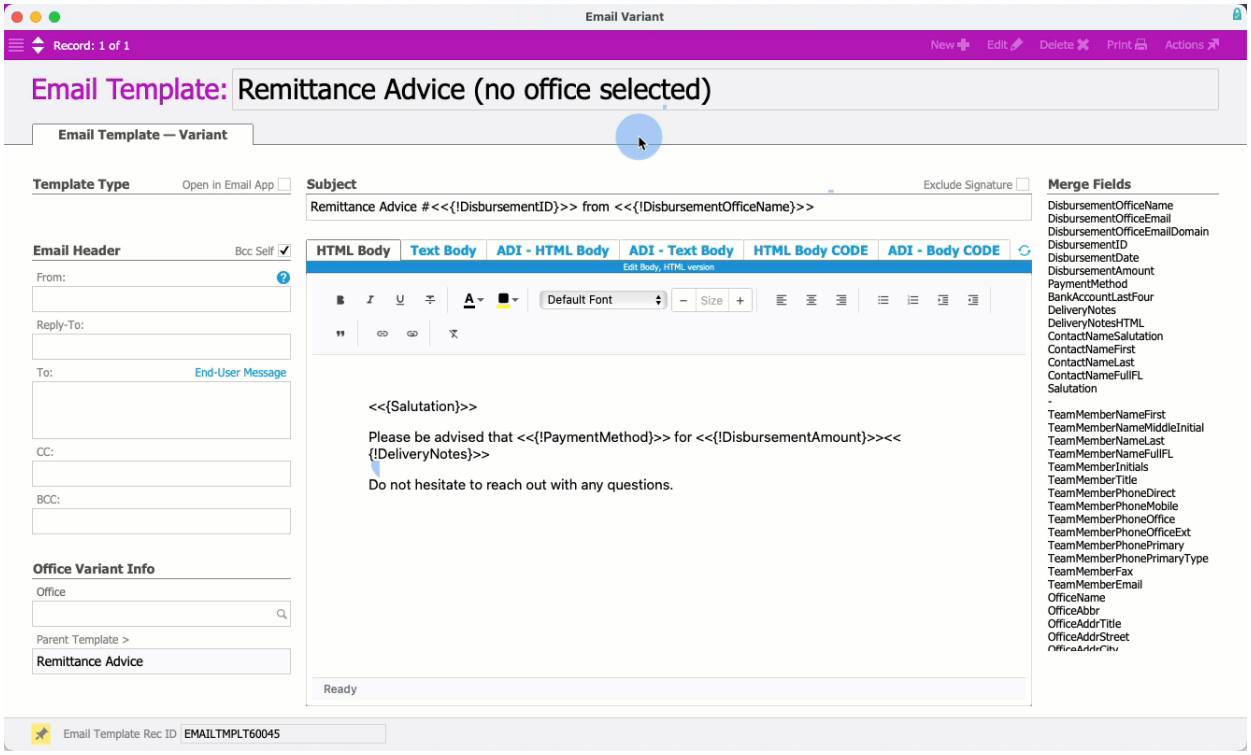
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Understanding Office Variant Templates

Email templates can have office-specific variations. To create an office variant for the template, from the Main Menu go to System Admin > Email Integration > Email Templates. Locate the email template you need, then select the Add icon ( ) in the Office Variants section > Create.



Selecting an office in the Office Variant Info section automatically enters the variant template name.



You can then edit the template as necessary. When a user within the specified office generates an email, that email will use the office variant template for the related record.